

PERFORMANCE AGREEMENT PURCHASE REQUISITION

PURPOSE: TO RECORD AND ENCUMBER FUNDS FOR A LECTURE AGREEMENT CONTRACT

REQUIRED DOCUMENTATION & PREAPPROVALS:

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. APPROVED PERFORMANCE AGREEMENT CONTRACT
3. COMPLETED AND SIGNED EVALUATION OF EMPLOYER-EMPLOYEE RELATIONS FORM
4. BUDGET NUMBER AND AVAILABLE FUNDING

REQUIRED ATTACHMENT: PERFORMANCE AGREEMENT CONTRACT SIGNED BY SPEAKER, CAMPUS CONTACT, AND DISTRICT PURCHASING AND CONTRACT SERVICES

CHECK “AMOUNT ONLY” BOX: YES

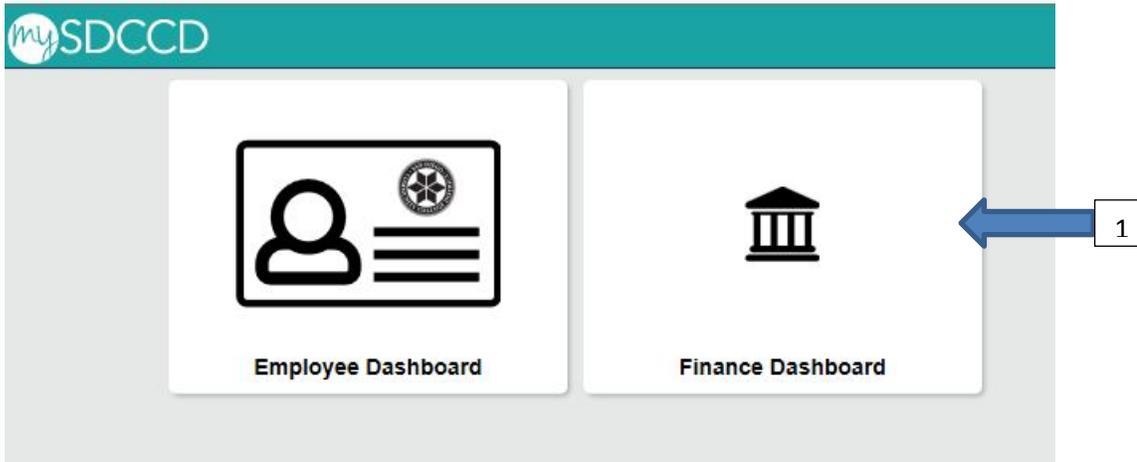
PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE REQUESTER WILL PROVIDE THE INVOICE TO ACCOUNTS PAYABLE - apinvoice@sdccd.edu. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTORS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

Note: The process for Performance, Lecture and Consultant Agreements is currently under review and changes will be forthcoming. When the new process is established, instructions will be updated and disseminated to the campus.

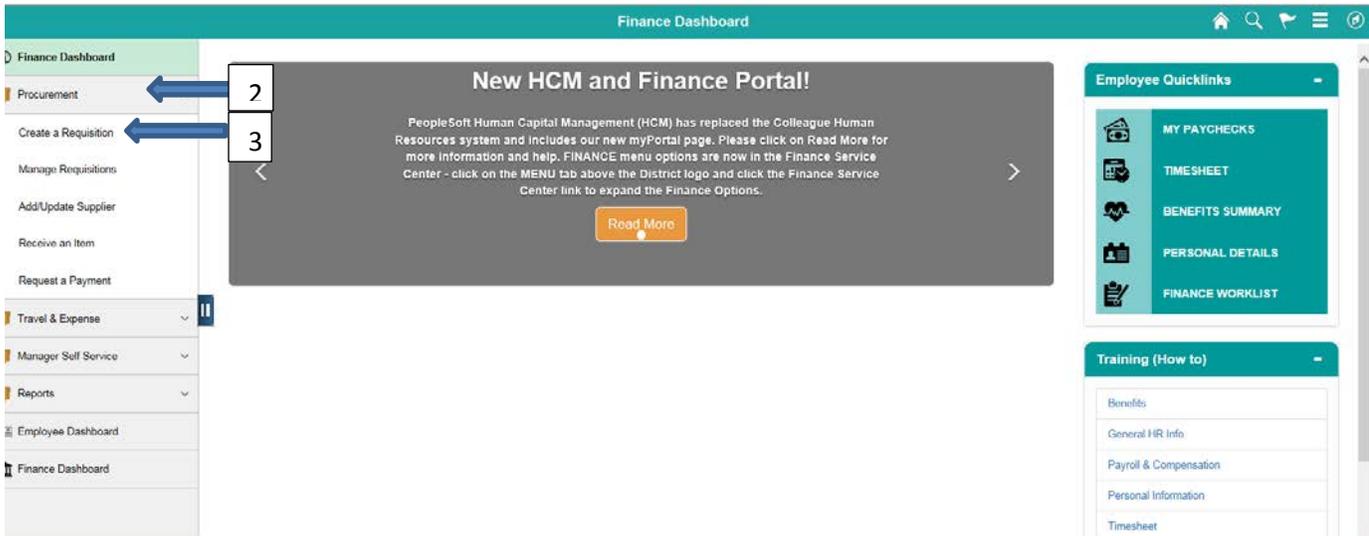
PERFORMANCE AGREEMENT REQUISITION

Log into PeopleSoft at myportal.sdccd.edu using your User ID and Password.

Select the Finance Dashboard.



Next, navigate to *Procurement/Create a Requisition*.



This is the *Requisition Settings* page. When creating a requisition, enter info on this page and it will auto populate into each line item of the requisition.

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote

*Requester Carrie De Moll Priority

*Currency

Default Options ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To Attention

Due Date Attention

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | First 1 of 1 Last

Chartfields1	Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account
	1		MIR	MIR01				

OK Cancel

The “Bid No/Quote” field should follow the naming convention “PERFORMANCE AGRMT – VENDOR NAME”. In the Default Options box, change the status from *Default* to *Override*.

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote

*Requester Carrie De Moll Priority

*Currency

Default Options ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier Category

Supplier Location Unit of Measure

Buyer

Supplier ID

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Enter search criteria to find a supplier.

Click the Magnifying Glass Icon for Supplier
Enter Supplier’s Name. Click Find.

Supplier's ID # and related information will pop up. Click on the circle to select vendor and click "Select".

Supplier Search

Supplier ID Find
Name JAMES C. COLLINS Reset
Short Supplier Name
Alternate Supp Name
City
Country State
Postal Code

Search Results Personalize | Find | View All | First 1 of 1 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input checked="" type="radio"/>	1 0000590433	JAMES C. COLLINS	MAIN	16203 SPANGLER PEAK RD	16203 SPANGLER PEAK RD	RAMONA	CA	

Select Cancel

Enter Category Code (918-38)

Buyer field should be blank

Attention field should be the Requester

Enter budget number (Fund, Dept, Product, Account). You should obtain this from your Dean or Manager.

Click OK.

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote PERFORMANCE AGRMT – COLLINS, JAMES
*Requester Carrie De Moll Priority
*Currency

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
 Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier Category 918-38
Supplier Location MAIN Unit of Measure EA
Buyer KROSAS

918-38 is the Category Code for all Lecture Agreements

Buyer field should be blank

Shipping Defaults

Ship To MIR
Due Date
Attention CARRIE DE MOLL

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | First 1 of 1 Last

Chartfields1

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account
1		MIR	MIR01				

OK Cancel

The Requisition Settings page is complete. To begin creating the requisition, click the "Special Requests" link.

Create Requisition ?

Welcome Elizabeth Ann Whitsett

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

- Catalog**
Browse Catalogs
CATEGORY
- Web**
Browse Supplier Websites
Grainger Punch Out
Office Solutions Punch Out
- Express Item Entry**
Create an Express Requisition
- Special Requests**
Create a non-catalog request
- Forms**
Create and Submit Forms
- Favorites**
Browse Favorite Items and Services
- Templates**
Browse Company and Personal Templates
- ePro Services**
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials
- Recently Ordered**
View recently ordered items and services
INSTALLATION MATERIALS
LABOR, PROJECT MANAGEMENT
LABOR, CABLE INSTALLATION, I...
PRINTER, LJ HP M610dn Printe...
BPO

Enter Item Description starting with "PERFORMANCE AGREEMENT – SUPPLIER'S NAME". Add the amount of the Performance Agreement and enter the quantity as "1". In the Additional Information box, enter the Performance Agreement Language shown below. Click all 3 boxes: Send to Supplier, Show at Receipt, and Shown at Voucher. Then click "Add to Cart".

Create Requisition ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description LECTURE AGREEMENT - COLLINS, JAMES

*Price 750.00 *Currency USD

*Quantity *Unit of Measure EA

*Category 918-38 Due Date

Supplier

Supplier ID 0000590433

Supplier Name JAMES C. COLLINS JAMES C. COLLINS Suggest New Supplier

Supplier Item ID

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX

Send to Supplier Show at Receipt Shown at Voucher

Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

Add to Cart

Highlighted areas require you to provide specific information for each agreement.

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM EFFECTIVE XX/XX/XXXX TO XX/XX/XXXX CONTACT PERSON: NAME/PHONE/AND/OR EMAIL SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

On the next page, click "Checkout".

Create Requisition ?

Welcome Carrie De Moll

[Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#) [Checkout](#)

Request Options

Search

Search

Advanced Search

On the Checkout page, attach the district-signed Performance Agreement under Comments

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit: San Diego Miramar College
Bld No/Quote:
*Requester: Carrie De Moll
Priority:
*Currency:

Cart Summary: Total Amount 750.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00	750.00			

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 750.00 USD

Click Icon under Details to select Amount Only

Shipping Summary

[Edit for All Lines](#)

Ship To Location: MIR
Address: 10440 Black Mountain Road
San Diego, CA 92126-2999
Attention To: CARRIE DE MOLL

Requisition Comments and Attachments

Enter requisition comments

Send to supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

[Check Budget](#)

[Pre-Check Budget](#)

[Save & submit](#) [Save for Later](#) [Add More Items](#) [Preview Approvals](#)

Line Details

Line 1: CONSULTANT AGREEMENT - JAMES C

Merchandise Amount: 8000.00 USD
Item ID: 915-25
Original Substituted Item Description: Goods
Physical Nature: Goods
Buyer: 100545

Contract Information: Use Contract if Available
Contract ID: [Search]
Contract Details: Version, Contract Line, Category Line

Supplier Information: Supplier ID: 000050433, Supplier Location: 0001, Supplier's Catalog

Manufacturer Information: Manufacturer ID, Manufacturer's Item ID, CTRN

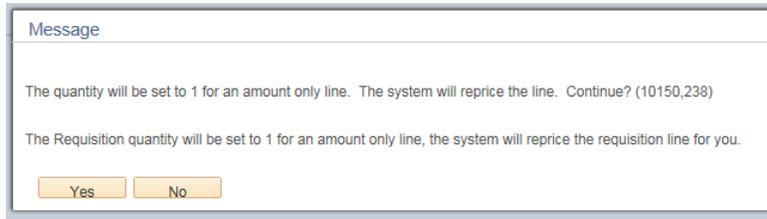
Sourcing Controls: Consolidate with other Req, Calculate Price, Override Suggested Supplier

HPO Required, Device Tracking, Zero Price Item, Amount Only

[OK](#) [Cancel](#)

Click OK

When the following message appears, click “Yes”.



Review all your information carefully. Click “Save for Later”, which will create a Requisition ID number. If everything appears correctly, click “Check Budget”.

Checkout - Review and Submit

Review the Item Information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit: San Diego Miramar College Bid No/Quote:
*Requester: Carrie De Moll Priority:
*Currency:

Cart Summary: Total Amount 750.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	LECTURE AGREEMENT - COLLINS, JA		JAMES C. COLLINS	1	EACH	750.00000	750.00		Edit	

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 750.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location: MIR
Address: 10440 Black Mountain Road
San Diego, CA 92126-2999
Attention To: CARRIE DE MOLL
Comments:

Requisition Comments and Attachments

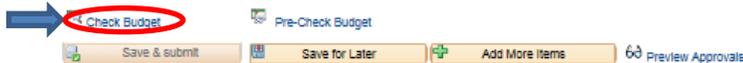
Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

[Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition



When the “Budget Checking Status” changes from “Not Checked” to “Valid”, proceed by clicking the “Save and Submit” button. This will start the approval process.



NOTE: If the check should be delivered to someone other than the supplier, complete a Special Handling Form and email it to APspecialhandling@sdccd.edu.